

Research Proposal to Evaluate an Online Finding Aid Interface

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### **Executive Summary**

The L. Tom Perry Special Collections at the Harold B. Lee Library (HBLL) on the campus of Brigham Young University (BYU) encodes their archival finding aids using EAD and presents them in a custom-built online interface. Since the creation of this custom interface over the last seven years academic archives and special collections have seen rapid changes in computing and networking technologies. These technology changes, including the rise of mobile computing, provide an opportunity for the Perry Special Collections to evaluate their current EAD online display in meeting the needs of staff and patrons. This research proposal seeks to evaluate whether the current EAD display in today's technology environment is meeting the needs of staff and patrons of the L. Tom Perry Special Collections. To evaluate the EAD display a usability study will be conducted with archival library staff, faculty, and students to better evaluate the effectiveness of the EAD display on mobile computing devices. Participants will be invited via email sent to campus colleges as well as in-person invitations at the entrance to the library. Participants will be surveyed before and after the usability test to better understand each participant's background and their customer satisfaction with the library's EAD interface. Participants will perform a series of tasks using the EAD interface on a mobile device. The results for each task will be recorded by a researcher. Server log data for the EAD interface will also be collected and anonymized to assess general usage trends since the interface went live seven years ago. Data collected will be analyzed using descriptive statistics methods and a quadrant analysis will be performed to match customer satisfaction with EAD interface quality. Results from this study will show whether the current EAD interface effectively meets the needs of users on mobile computing devices.

## Introduction

Archives and special collections perform important roles within an academic library. Their work to collect, catalog, store, and preserve enables researchers and patrons continued access to rare, valuable, or culturally significant items that are needed for scholarly research. To assist researchers and ensure the long-term preservation of archives and special collection items archivists create detailed descriptions of items in their archives. These descriptions, referred to as finding aids, are multidimensional serving both the library and archivists' needs of preservation and storage as well as the research needs of patrons accessing archival materials (Duff & Stoyanova, 1998, p. 44). Finding aids are the "workhorse of archival practice" (Gilliland-Swetland, 2001, p. 200). These archival descriptions have been encoded in many forms throughout time from clay tablets to printed paper to advanced electronic displays. The adoption of computer and internet technologies in the late twentieth century enabled the creation of new electronic encoding formats for finding aids.

The Encoded Archival Description (EAD) is a digital encoding format for finding aids in an online environment (The Library of Congress, 2012). EAD is a relatively new archival description format. Based on computer markup languages (SGML and XML) EAD allows variability in display style (The Library of Congress, 2012) while being well structured and easily parsed by machines and humans. EAD and the World Wide Web extends the availability of the finding aid, potentially reaching more patrons outside an archive's local community (Coats, 2004, p. 32).

### **Research Problem and Question**

To help staff and patrons discover and retrieve archival holding metadata the L. Tom Perry Special Collections encodes their finding aids using EAD and presents them in a custom-built online interface (HBLL, 2015). The current interface design was influenced by a competitive set analysis and usability study performed by archivists at the Perry Special Collections (Nimer & Daines, 2008). Over the last seven years academic archives and special collections have seen rapid changes in computing and networking technologies. Due to these rapid technological changes an EAD interface created even a few years previously may not sufficiently meet the needs of present-day staff and patrons (Zemsky and Wegner, 2007). Recent technology changes, including the rise of mobile computing, provide an opportunity for the Perry Special Collections to evaluate their current EAD online display in meeting the needs of staff and patrons.

The literature is inconclusive about the best EAD display method (single vs. multiple screens) and searching experience. Research related to using online finding aid displays on mobile devices is non-existent. This research proposal seeks to answer whether the current EAD display in today's technology environment is meeting the needs of staff and patrons of the L. Tom Perry Special Collections. The proposed study aims to answer the following research questions:

- In today's technology environment is the current EAD display meeting the needs of staff and patrons of the L. Tom Perry Special Collections?
- What display method meets users' needs most effectively?
- Can staff and patrons easily search and browse the EAD catalog on a mobile device?

- Can staff and patrons identify archival information using a mobile device with the current multi-screen interface?

### **Literature Review**

To further explore the above study questions this proposal investigates significant literature related to the effective display of EAD finding aids. The literature spans the last 20 years of research and includes twelve research studies exploring the usability of EAD by archives and special collections (Allison-Bunnell, Yakel, & Hauck, 2011; Chapman, 2010; Daniels & Yakel, 2010; Duff & Stoyanova, 1998; Hostetter, 2004; Kim, 2004; Nimer & Daines, 2008; Prom, 2004; Redding, 2002; Schier, 2006; Yakel, 2004; Zhou, 2007). Three research studies included content analysis of various academic institutions' use of EAD (Kim, 2004; Nimer & Daines, 2008; Zhou, 2007). Some studies exclusively used one or more surveys to gather research data (Allison-Bunnell et al 2011; Hostetter, 2004; Redding, 2002) while others combined a survey, usability test, and post-test interview (Chapman, 2010; Daniels & Yakel, 2010; Prom, 2004; Yakel, 2004). Nimer & Daines (2008) performed content analysis with a two-phase usability study while redesigning the Perry Special Collection's EAD interface. One study gathered research data using focus groups to identify user needs related to the presentation of EAD (Duff & Stoyanova, 1998). Another asked remote participants to perform specific tasks with an EAD followed by a series of questions about their performance (Schier, 2006). Chapman's (2010) usability study is one study that gathered and analyzed quantitative data related to the speed a user took in completing tasks using an EAD. This stands in contrast to the studies focused on gathering and analyzing qualitative data about EAD display and use. These studies are primarily preliminary studies of a descriptive nature that limits their ability to extrapolate results for a wider audience of academic archives and special collections and their patrons (Redding, 2002; Schier, 2006, p. 76). The inability to apply these study results to a

broader audience stands in opposition to the original intent of EAD: to extend the availability of finding aids outside of an academic archive or special collection's local community to patrons throughout the world using the World Wide Web (Coats, 2004, p. 32). Future studies should take this issue into consideration as the audience for EAD continues to expand.

These twelve research studies identify three major areas of interest related to evaluating an EAD display: user groups, display methods, and search. Researchers point out that archivists have potentially missed the expanded audience of EAD and tend to prepare finding aids within an archivist-centric context that disregards the needs of other patrons (Cox, 2008, p. 8; Daniels & Yakel, 2010). Another viewpoint is that archivists preparing an EAD presuppose that the audience is already familiar with archives and special collections (Schier, 2006). The literature leans heavily towards assessing and evaluating the needs of all users, not just archivists and expert academic researchers. The assumption made in the literature is that an EAD interface should allow for anyone to use it successfully with minimal to no help and strongly advocates for user-centered usability research (Yakel, 2004, p. 75).

A study interviewing patrons from institutions within the Northwest Digital Archives (NWDA) about their use of finding aids revealed a lack of academic institutions' understanding their patron's information needs (Allison-Bunnell, Yakel, & Hauck, 2011, p. 97). Prom (2004) observes that since the primary focus for archivists in previous years has been on standards and processes for material and tool creation "we therefore know relatively little about how users actually interact with the descriptive records that archivists prepare" (p. 237). While the display of EAD has improved from earlier years there is a clear tension between trying to meet the needs of disparate user groups particularly when users of one academic library may not necessarily be

the users for another library (Duff & Stoyanova, 1998). This gap in the literature provides opportunities for further assessment and research into concretely identifying EAD user groups and their needs (Allison-Bunnell et al., 2011, p. 97-98; Hostetter, 2004, p. 136). The existing research demonstrates that to effectively evaluate the display of EAD requires understanding EAD users and their needs.

A second area of interest is whether the entire EAD should be displayed on a single screen or divided up by hierarchical element over multiple screens. In a second phase of their usability study Nimer and Daines (2008) found that users preferred EAD content organized using multiple screens as opposed to providing the contents of the entire EAD on one single screen (p. 227-228). This approach is found to be less effective for users in another study that shows the benefit of presenting the entire EAD on one single web page (Prom, 2004). "The page's simple design provided subtle but powerful visual clues" that enabled users to easily scan and find information within the EAD (Prom, 2004, p. 264). This is one area that will need additional research and study to accurately evaluate user's wants and needs related to the visual display of elements in an EAD.

Search is a third theme that researchers found to play a significant role in an EAD interface. The EAD combined with the World Wide Web provides better searching particularly aligned with Bates' "berrypicking" search technique (1989). It also provides hyperlinks to related items or digital representations of archival materials (Gilliland-Swetland, 2001). Zhou (2007) performed a content analysis study focusing exclusively on search features within EAD. Results from this study showed that search capabilities varied widely across finding aids. Varying implementations of search can lead to confusion where patrons aren't sure what to expect when



using finding aids (p. 117). Current EAD search tools are effective for archivists and computer experts but became barriers to successfully completing search tasks for novice users (Prom, 2004; Yakel, 2004). The overall consensus points towards the need for more research related to the EAD search interface. Better assessing the use of search within an EAD interface will lead to identifying how to improve the EAD search interfaces in ways that will more effectively meet the needs of EAD users.

Hu (2012) noted that as technology continues to evolve and change at a rapid rate "we should expect that user behavior, preference, and expectation will likewise change over similarly brief intervals of time. Today's finding aid design or object display tool may not meet future needs (p. 190). In the last 10 years the world has seen rapid technology improvements with mobile technologies and the World Wide Web. The use of EAD interfaces on mobile devices is a glaring gap in the literature that would be beneficial to study. An interface that works on a laptop or computer screen may not always work for a smaller, touch-based screen. Because of this gap in the literature, this research proposal seeks to evaluate the use of archival materials on mobile devices and whether the current EAD interface meets mobile users' needs. The literature also identifies understanding user needs, EAD display methods, and using search features for effectively meeting users' information needs as areas in need of further study. The proposed usability study seeks to further explore these areas of research by evaluating the current EAD display used by the Perry Special Collections.

### **Research Design**

To remedy the lack of existing research for EAD displays on mobile devices and inconclusive results about the best EAD display method this paper proposes conducting a usability study of the Perry Special Collections EAD interface to evaluate whether or not the current display meets the needs of staff and patrons. Results from the study will help determine whether the current EAD interface should continue status quo and in what ways the interface should change to better meet users' needs. The usability study will be a series of tasks for each participant to accomplish focused on testing how the participant uses the current multi-screen EAD interface on a mobile computing device. Each participant will be given the same tasks with the same computing environment. The correctness of completing a task as well as the time it takes to complete the task will be recorded. The usability test will help demonstrate how effective the EAD interface is in helping the user accomplish the listed task. Participants of the usability test will perform the tasks using mobile devices (e.g. tablet and smartphone) to gauge the EAD interface's effectiveness on a mobile computing device. As participants try completing each task, their actions on the computing devices will be screen recorded for later analysis. One researcher will be present with each participant as they complete tasks to answer questions and give guidance as needed. The researcher will use an evaluation form to determine whether a task was successfully completed and the length of time it took for the participants to complete the given task. Recorded screen sessions will be used to verify whether tasks were completed successfully as well as the duration for completing the task.

Included with this usability test will be pre- and post-test surveys (see Appendix A and Appendix B). The pre-test survey will help identify basic background information about each

participant such as gender, role at the university, and experience level with computers and archival finding aids. The post-test survey will help gauge customer satisfaction and EAD interface quality as well as provide a place for participants to provide comments on the EAD interface.

In addition to the two surveys and usability test the server logs for the EAD web application will be collected and anonymized. Although the server logs will be stripped of any identifying information (e.g. account username, IP address), the information found in anonymized server logs can help show general usage trends over time as well as the type of device accessing the web application. These general usage statistics will help to see the popularity of the EAD interface, areas within the web application that received the most use, and how many visitors to the web application used a mobile computing device.

While the proposed study seeks to answer the previously listed research questions there are inherent assumptions and limitations to this study. Assumptions made with this study include the concept that the EAD interface is being evaluated and not the participants. Participants failing to complete a task should be assumed to be a problem with the interface rather than something wrong with the participants. A successful EAD display is one where the participant is able to effectively find the information they need from the library's special collections holdings. It is assumed based on previous research that an effective EAD interface can be successfully used by any user type including novice users.

This research design is limited in ways related to the sample and population used in the study. This usability test is not intended to test the effectiveness of the interface on every possible user type but is limited to archival library staff, campus faculty, undergraduate students, and

graduate students who's work and research may involve using materials found in the Perry Special Collections. The usefulness of the study is dependent upon strong representation for each user group and isn't as important to generate a purely random sample (Emanuel, 2013, p. 207). As is the case for most usability studies the sample population is self-selected and may result in participants that have experience with finding aids or may be opinionated about what makes a good EAD interface. To help mitigate against pre-formed opinions by participants, invitations to participate in the study will not reveal what specific interface is being tested. Another possible limitation is that those willing to participate in the study may have already had some level of use with the EAD interface and so may miss finding users with little to no experience with the service. While an effective EAD interface would be usable and understandable to the novice as well as the advanced user, this usability test aims to see how effective the current EAD interface is for users within the previously defined university roles. A final limitation of this study is that the results of the study are not meant to produce new feature ideas but rather to "determine if an interface is effective and if it should continue in its current state" (Emanuel, 2013, p. 204).

## **Methodology**

### **Populations and Sampling**

This study relies primarily on the participation of library archival staff, faculty, and students. Because the number of library staff is limited and well known all archival staff will be invited to participate in the study. Faculty will be invited to participate by sending email invitations to campus colleges who would have a direct interest in the Perry Special Collections holdings (i.e. Family Home and Social Studies, Fine Arts and Communications, Humanities, Graduate Studies, and Religious Education). Invitation to campus colleges will also be directed to students in those colleges. Lastly, patrons of the library will also be allowed to participate by approaching a station setup at the entrance of the library advertising the usability study. The surveys and usability test will be administered within the library's usability testing lab. Participants in the survey will be offered a complementary gift card to the campus bookstore as an incentive to participate. Server logs for the web application dating back to when the application was originally developed to the present day will be gathered. The server logs will be anonymized before analyzing, removing any personal identifying information (e.g. account username and IP address).

### **Instruments**

Participants in the usability test will be given a pre-test survey that will identify their role at the university, their experience with computer and networking technologies, and their experience with archival finding aids (see Appendix A). The pre-test survey will include a consent form for the participant to sign acknowledging they understand what data is being collected and how that data will be handled and shared. The usability test will include a series of

tasks written on paper for the participant to perform using the Perry Special Collection's EAD interface and application (see Appendix C). The researcher will use a usability test evaluation form to determine whether a participant successfully completed a given task and the time it took to complete the task (see Appendix D). After the usability test is complete the participant will be given a post-test survey. This final survey will be used to measure the customer's satisfaction with the EAD interface as well as the perceived quality of the interface (see Appendix B). The post-test survey will ask the participant to rate specific areas of the EAD interface that helped them complete each usability test task. Anonymized server logs for the EAD web application will also be gathered as part of the evaluation to see usage trends over time as well as what type of computing devices were used to view the EAD interface.

### **Data Collection**

Survey responses in the pre-test will be coded to numerical values to facilitate quantitative analysis. The usability test will be screen recorded for later review to see how participants interacted with the EAD interface when accomplishing a specified task. While the test is performed a researcher will observe the participant as they complete each task and will record whether the task was completed successfully and the time it took for the task to be completed. The post-test survey responses will be coded to numerical values except for the open-ended comment question. Answers for the comment question of the survey will be entered into a database after the test is completed to make it possible to perform textual analysis on participants' responses.

### **Analysis**

The first data to analyze are the anonymized server logs for the EAD interface. Although the logs will be anonymized and thus prevent seeing how many unique visitors came to the site, the server logs will show usage of the application over time. It will identify which areas of the web application are visited, for how long, and when. These server stats will also show the type of computing device that viewed the site. The device-specific information will help evaluate how much traffic the site receives using mobile devices. This data in combination with the survey and usability test data will help determine whether the EAD interface is effective on mobile computing devices.

Tables, charts, and graphs will present descriptive data from the surveys and usability test results. The two surveys include questions that describe the participants, evaluate their view of the importance of the online finding aid system, and rate how well the system helped them accomplish tasks given them during the usability study. These surveys include ordinal, nominal, and interval variables that can be interpreted using quantitative measures like frequency, averages, and variability. These descriptive measures will be presented using tabular and graphic displays. Usability test results showing whether a task was completed successfully and how long it took the user to complete the task will also be presented with tables and charts. These descriptive statistics will be used to look for patterns related to participant characteristics, their use of the EAD interface, and how satisfied they were using the interface on a mobile device. Usability test questions that are a struggle for a majority of participants to complete successfully will indicate ineffective areas in the EAD interface that may need to be redesigned for use on a

mobile device. Identifying test results by user group will be another way to analyze the results to find ways in which the EAD interface is effective or needs further improvement.

Survey questions evaluating participants' view of the library's online finding aid system's importance and the service's ability to help meet their needs can be plotted on a quadrant analysis chart. This will help to visually identify how well the service is meeting the needs of patrons. I plan to use the quadrant analysis framework shared by Hernon and Altman (2010) to interpret these service expectation questions from the surveys (p. 156-158). The quadrant analysis will be used to compare customer satisfaction with service quality. For example, the first question on the post-test survey (see Appendix B) tries to ascertain the participant's view on the quality of the library's online finding aids. The second question determines how the participant feels about basic characteristics of the library's EAD display. Taken together the two questions help to see how the participant's expectations coincide with their level of satisfaction. Disagreement with the first question will indicate that there is gap between what the participant expects and the level of service they receive. Satisfaction statements about the library's online finding aids will help identify the participant's level of service encounter satisfaction with online finding aids (Hernon and Altman, 2010, p. 138). This quadrant analysis can be then compared with results from the usability test. Usability test tasks where a participant is unsuccessful should correspond to low customer satisfaction and low service quality. Usability tests where the customer is successful should map to high customer satisfaction and high service quality.



### **Conclusion**

Since the creation of the current EAD interface in 2008, technology changes have advanced rapidly providing an opportunity for the Perry Special Collections to evaluate whether the current EAD online display is effective in meeting the needs of staff and patrons. An effective EAD interface is of a high quality and results in a high level of satisfaction in staff and patrons. Finding answers to the proposed study's research questions will come from following the described research design, methods, and analysis. Participants from the three main user groups (archival library staff, faculty, and students) whose studies and research tie into the use of the Perry Special Collections will provide the necessary user population to conduct the usability test. Each participant will answer basic identifying characteristics using the pre-test survey. Answers in this survey will be used to categorize, describe, and summarize the results of the usability test and post-test survey. The usability test will contain specific tasks to complete using the EAD interface on a mobile device. Participants will be evaluated on whether they successfully completed a task and how long it took to complete the task. They will then take a post-test to evaluate their satisfaction and perceived EAD interface quality while using a mobile device. Is the current EAD interface effective in meeting mobile users' needs? Can mobile users effectively search and find archival information using the EAD interface? Is the current multi-screen EAD interface a help or barrier to staff and patrons finding the information they seek? The analysis of the survey and test results from this study will answer these research questions showing whether the current EAD interface effectively meets the needs of users on mobile computing devices.

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## Appendix A

### Pre-test Survey

1. What is your age?

\_\_\_\_\_ years old

2. What is your gender?

Male

Female

3. What is your role at the university?

Undergraduate Student

Graduate Student

Faculty

Staff

Other

4. How long have you been at the university?

Less than 1 year

1 year

2 years

3 years

4 years

More than 5 years

5. How many years of experience do you have with a computer?

Less than 1 year

1-2 years

3-4 years

5-6 years

7-8 years

More than 8 years

6. How many years of experience do you have with the Internet?

Less than 1 year

1-2 years

3-4 years

5-6 years

7-8 years

More than 8 years

7. Do you have experience using a mobile computing device? (e.g. tablet, smartphone)

Yes  No

8. How long have you used a mobile computing device?

Less than 1 year

1-2 years

3-4 years

5-6 years

7-8 years

## Appendix B

### Post-Test Survey

1. Please rate the following statements about the HBLL Finding Aid website (rate on a scale from 1 to 5, where 1 = Strongly Disagree, 2 = Agree, 3 = Don't know, 4 = Disagree and 5 = Strongly Agree):
  - It was easy to find information on the HBLL Finding Aid website.
  - The HBLL Finding Aid website appears to have all the functions and capabilities I need.
  - I was able to recover from mistakes very quickly using the HBLL Finding Aid website.
  - I am satisfied with the HBLL Finding Aid website.
  - I would recommend this web site to others.
  - The library's online finding aid website helped me find the information I needed in special collections.
  
2. How satisfied are you with the library's online finding aids? (rate on a scale from 1 to 5, where 1 = Completely Dissatisfied, 2 = Dissatisfied, 3 = Don't know, 4 = Satisfied and 5 = Completely Dissatisfied):
  - ease of use
  - able to navigate to find what you need
  - appearance
  - searching for a finding aid
  
3. Do you have any additional comments about the HBLL Finding Aid website?

## Appendix C

### Usability Test

#### Task 1

1. Browse to the finding aid for the Eliza Maria Partridge Lyman diary.
2. What is the **Extent** of this collection?
3. What are the **Access Restrictions** for this collection?
4. Who was the **Finding Aid Author**?

#### Task 2

1. Search for the Loyd Alexander papers finding aid.
2. What is the **Extent** of this collection?
3. What are the **Access Restrictions** for this collection?
4. What is the **Call Number** for this collection?
5. How many **Series** are there in this collection?
6. Who is the **Curator** for this collection? What is their email address?

#### Task 3

1. Perform an advanced search for the Cecil B. DeMille papers, call number MSS 1400.
2. What is the **Extent** of this collection?
3. What are the **Access Restrictions** for this finding aid?
4. Who was the **Finding Aid Author**?
5. What is the **Biographical History** for this collection?

## Appendix D

### Usability Evaluation Form

#### Task 1

1. Browse to the finding aid for the Eliza Maria Partridge Lyman diary.  
Correct  Incorrect  Time to complete: \_\_\_\_\_
2. What is the **Extent** of this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
3. What are the **Access Restrictions** for this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
4. Who was the **Finding Aid Author**?  
Correct  Incorrect  Time to complete: \_\_\_\_\_

#### Task 2

1. Search for the Loyd Alexander papers finding aid.  
Correct  Incorrect  Time to complete: \_\_\_\_\_
2. What is the **Extent** of this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
3. What are the **Access Restrictions** for this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
4. What is the **Call Number** for this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
5. How many **Series** are there in this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
6. Who is the **Curator** for this collection? What is their email address?  
Correct  Incorrect  Time to complete: \_\_\_\_\_

#### Task 3

1. Perform an advanced search for the Cecil B. DeMille papers, call number MSS 1400.  
Correct  Incorrect  Time to complete: \_\_\_\_\_
2. What is the **Extent** of this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
3. What are the **Access Restrictions** for this finding aid?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
4. Who was the **Finding Aid Author**?  
Correct  Incorrect  Time to complete: \_\_\_\_\_
5. What is the **Biographical History** for this collection?  
Correct  Incorrect  Time to complete: \_\_\_\_\_



## Appendix E

### Consent Form

I agree to participate in the study conducted and recorded by the Harold B. Lee Library (HBLL).

I understand and consent to the use and release of the recording by the HBLL. I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied and used by the HBLL without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: \_\_\_\_\_

Please print your name: \_\_\_\_\_

Please sign your name: \_\_\_\_\_

Thank you!

We appreciate your participation.